## SECTION III

**INSTRUCTIONS FOR MAKING CHANGES TO THE DATA COLLECTION SHEET**

The Rutherford County data collection sheet to be used during the reappraisal project is a computer-generated document on which the property characteristic data has been preprinted. This information was converted from the existing Rutherford County files. The data may or may not be correct. It is the data collector and/or reviewer's responsibility to verify all existing data and to complete all data that is not listed.

The following procedures are to be followed when the data is correct, when changes need to be made, and/or when information needs to be added.

1) If preprinted data is correct, go on to the next field required. No notation is required.

2) If the preprinted data is incorrect, draw a line through the data and write the correct data in the shaded maintenance area or available space adjacent to the old data.

3) If a required field is blank, enter the correct data on the property record card in the appropriate maintenance area or available space.

## USE OF THE DATA COLLECTION SHEET

The following information is a list of the field/block items on the data collection sheet and the source of the data for that field's input:

### Parcel Summary Block
### From GV50

Parcel Number
Pin Number
Account Number
Township
Special Districts
Situs Address
Name
Property Description/Address
Date Transferred
Stamps
Qualified Code
Deed Book/Page
Previous Values
Total Acres

### Data Collector to Supply

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| Date Visited | Date the property characteristics were collected and/or verified |
| Appraiser | Appraiser's initials |
| Info By | Who verified the data that is being collected E-Estimate by the Lister, O-Owner, R-Relative of the Owner, T-Tenant |
| Reviewed By/Date | Appraiser's initials and the date the values were reviewed for finalization |
| Land Use | (Rightmost portion) Appraiser that processes the application for land use |
| Status | Relative position of the process (denial, acceptance, under review) |
| Zone | Enter the municipality's zoning code. Code file ZONECODE |
| Land Use | (Leftmost position) Place a U here to show that the parcel has been accepted for land use deferment |
| Utilities | Select all the codes that apply. The use of the 'A' code can be supported by the individual types that are present. Code file UTILCDE |
| Use Value Method | Utilize only the 'U' code |
| Land Use (type) | Predominant use of the land |
| Neighborhood | Defined by the neighborhood analysis. See the neighborhood maps for the parcel's neighborhood code or use the parent parcel's code. Code file NBRHDCDE |
| Landscape Quality | Select the quality of the landscaping (curb appeal) for the subject parcel. Code file LANDSCPCDE |
| Topography | Select the general lay of the land for the parcel. Code file TOPOCDE |
| Road | Check the primary road access for the parcel. Code file ROADCDE |

### Land Block

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| Valuation Method | Select the valuation method per land segment. See Section 4 for their use. Code file TALNDCDE |
| Segment Type | How the property is being used. Select the segment type. See Section 4 for their definitions of use. Code file SEGTYPECDE |

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| Acreage | Required for the Acreage method. Enter the amount utilized for the segment type. May use 3 decimals. Sum of all segment types should add equally to the TOTAL ACRES in the Parcel Summary block |
| Grade | Not a required item. May be used if the segment is used either below or above it's highest and best use |
| Actual Frontage | Enter the actual amount of road frontage from the tax map. Its use is primarily descriptive |
| Effective Frontage | Required for the Frontage method. Enter the effective amount of road frontage as calculated by the standards established in Section 4. See The Appendix |
| Unit Price | Used in the Sound Value method. Place the value for the segment here |
| Rear Feet | Not used at the present time |
| Effective Depth | Required for the Frontage method. Enter the effective depth as Calculated by the standards established in Section 4. See the Appendix |
| Depth Factor | Supplied by GV43 |
| Class | Enter the Soil Class (I-VII) – See Land Use Schedule. Code file TASOILCDE |
| Soil Type | Enter the Soil Class (I-VII) – See Land Use Schedule |
| Number of Lots | Required for the Lot Method. Enter the number of lots to be appraised |
| Adjustments | As many as five adjustment types per segment. Enter either the Positive or negative number for the percentage of adjustment. See Section 4 for the definition of their use. Code file TAADJCDE |
| Remarks-Land | Free form field for notes about land data or valuation |

## BUILDING SUMMARY BLOCK

This block defines information that applies to the entire improvement being described.

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| Building # | The number to assign to the improvement |
| Valuation Method | Select the valuation method per improvement. Use R for Single Family Houses, use C for Commercial and Mobile Homes and I for Industrial properties. Use P or CP for miscellaneous improvement items (yard items, detached items), and S for items with minimal value contribution. Code file TAMTHCDE |
| Building Use | How the improvement is being used, regardless of original intent of construction. Value indicative for the P and CP method, descriptive for the other methods. See Section 3 for their description. Code file BLDGUSECDE |
| Building Class | Enter the structural type of the improvement. See section 2 for their descriptions. Code file TACLASCDE |
| Quality Grade | Enter the overall quality of the improvement. See Section 2 and 3 for their separate definitions. Code file TAQLTYCDE |
| Condition | Enter the overall condition of the improvement. See Section 2 and 3 for their separate definitions. Code file TACONCDE |
| Description | Free form field for identifying the improvement |
| Net Square Feet | Determined by GV43 |
| Total Square Feet | Determined by GV43 except for the P, CP, and S methods. For these methods, enter the total number of units ( area linear feet) to be used for calculating replacement cost new |
| #Units | The number of improvements exactly alike the one being described. Should be used with care especially where the R, C, and the I methods are used. |
| Actual Year Built | Enter the historic date of construction |
| Effective Year Built | Enter the effective date of construction. Used to arrive at the depreciation percentage |

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| Physical % | An over-ride from the table driven methods for the physical deterioration portion of accrued deprecation. Describes the amount "bad" to be subtracted from replacement cost new. See section 2 for a discussion on deprecation |
| Functional % | The percentage to subtract from replacement cost new less the Physical % |
| Economic % | The percentage to subtract from replacement cost new less the Physical % and the Functional % |
| Completion % | The completion percentage of the improvement. 100% is assured if nothing is entered |
| Sound Value | The contributory value of the improvement using the S method |
| Remarks | Free form field for notes about building data or valuation |
| PPMH | Enter the number of personal property mobile homes |
| SWDW | For solid waste collection |
| #MHMS | For solid waste collection |
| Dump Y/N | For solid waste collection |

## BUILDING DETAIL BLOCK

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| Building # | The section number that corresponds to the Building Summary's number, followed by a "-" where one or more sections exist and the number of the section (i.e., 1-1 for the first section in the first building, 1-2 for the second section in the first building) |
| Section Type | The construction type for the section being defined. How the section was built at it's original use. May be a man or ancillary section. Determines the schedule to be used for pricing the section. Code file TATYPCDE |
| Area | The base ground floor area or the "footprint of the section". Will not need to supply if a computerized sketch is provided; otherwise, the area will need to be provided (base ground floor area only) |
| Style | Enter the style of construction. Code file TASTYCDE |
| Number of Stories | The total of the section area divided by the ground floor area. Only one decimal is needed (ex: 2000 square feet total, 1800 square feet in the ground floor = 2000/1800 or 1.1 Number of Stories). Round to the nearest tenth. In the case of ½ percent (i.e., 1.25) round down |
| Story Height | Enter the average wall height as measured from the top of an improvement's foundation to the eave of the roof. Enter in whole feet |
| Foundation | Enter the predominant type of foundation for the improvement. Code file TAFNDCDE |
| Exterior Wall 1 | Enter the exterior wall code and the percentage of that code type's Use. Divide the code and the percentage in the block with a "/". Percentage may be 100% or less but all exterior wall %'s must equal 100 %. Code file TAWALCDE |
| Exterior Wall 2 | See above |
| Actual Year Built | Enter the original year of construction if different from the improvement's date |
| Effective Year Built | Enter the effective year of construction if different from the improvement's date |
| Condition | Enter the condition if different from the improvement's condition |
| Grade | Enter the grade if different from the improvement's grade |
| Cost and Design | (DES%) Enter the percentage (positive or negative) as a whole number. Used to change the section's replacement cost be the percentage defined. This is not to be confused with changes in quality of construction. This is for use when unusual cost or design items are atypical for a particular quality of improvement |

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| Quality Interior | Define the relationship of the quality of the interior finish to the quality grade for the section |
| Quality Exterior | Define the relationship of the quality of the exterior finish to the quality grade for the section |
| Physical % | Enter the depreciation percentage if different from the improvement's percentage. An over-ride from the table driven methods for the physical deterioration portion of accrued depreciation. Describes the amount of "bad" to be subtracted from replacement cost new |
| Functional Code | Enter the type of functional obsolescence observed. Code file TAFNCCDE |
| Functional % | Enter the depreciation percentage if different from the improvement's percentage |
| Occupancy Code | The generic use of the section. Code file TAOCYCDE |
| Roof Type | Enter the type of roof for the section. See Section 2 for the examples. Code file TARFNCDE |
| Roof Cover | Enter the type of roof cover for the section. Code file TARFGCDE |
| Basement Sq. Feet | Enter the actual total floor area of any basement type being defined. Enter in whole numbers |
| Bsmt. % Finished | The percentage of Basement sq. Feet that is finished in a manner equal to the section type code being defined |
| Attic Square Feet | Define as ½ story |
| Attic % Finished | Define as ½ story |
| Building # | The section number that corresponds to the Building Summary's number, followed by a "-" where one or more sections exist and the number of the section (i.e., 1-1 for the first section in the first building, 1-2 for the second section in the first building) |
| # Rooms | Primarily for residential properties. Enter the total number of rooms used for living purposes, including bedrooms but excluding bathrooms |
| # Bedrooms | Primarily for residential properties. Enter the total number of bedrooms in the dwelling. Could be used for apartments as a description for the improvement being described, regardless of the number of units in the building |
| # Full Baths | Enter the whole number of three or more fixture bathrooms in the mprovements |
| # Half Baths | Enter the whole number of two fixture bathrooms in the improvement |
| Additional Fixtures | Enter the whole number of fixtures not accounted for in the full or half bath description. Those items include a kitchen sink and a hot water heater for residential purposes and all plumbing fixtures for commercial and industrial purposes. |
| Fireplace Openings | Enter the total number of openings in this section without regard to the number of stacks |
| Chimneys/Stacks | Enter the number of stacks observed in the section |
| % Interior Finish | Enter the percentage of finish for the interior wall type(s) being defined. Usually 100% unless a portion of the improvement has either or a combination of no floor, roof, or walls |
| % Heat | Enter the percent of the total area in the section heated. May exceed 100% to capture basements and attics that are heated |
| % Air Conditioning | Enter the percent of the total area in the section air conditioned. May exceed 100% to capture basements and attics that are air conditioned. |
| % Sprinkler | Enter the percent of the total area in the section that has sprinkler systems. May exceed 100% to capture basements and attics that have sprinkler systems |
| Perimeter Multi. | Enter the amount of linear feet of an outside (or what was once an outside wall) that does not have any walls in common with another main section. Required for commercial and industrial improvements to establish their size adjustment |

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| Floor Covering 1 | Enter the code of the total area in the section that has the type of floor covering being defined. Code file TAFLRCDE |
| Floor Covering 1% | Enter the percentage of the total area in the section that has the type of floor covering being defined |
| Floor Covering 2 | Enter the code of the total area in the section that has the type of floor covering being defined |
| Floor Covering 2% | Enter the percentage of the total area in the section that has the type of floor covering being defined |
| Interior Wall 1 | Enter the code of the total area in the section that has the type of Interior Wall being defined. Code file TAINTCDE |
| Interior Wall 1% | Enter the percentage of the total area in the section that has the type of Interior Wall being defined |
| Interior Wall 2 | Enter the code of the total area in the section that has the type of Interior Wall being defined |
| Interior Wall 2% | Enter the percentage of the total area in the section that has the type of Interior Wall being defined |
| Fireplace Type | Enter the predominant type of fireplace(s) being defined. If more than one type per section, enter the most predominant type |
| Heat Type | Enter the predominant type of heating fuel being defined. If more than one type per section, enter the most predominant type. Code file TAHETCDE |
| Heat Fuel | Enter the predominant type of heating fuel being defined. If more than one type per section, enter the most predominant type |
| Air Conditioning | Enter the predominant type of air conditioning being defined. If more than one type per section, enter the most predominant type. Code File TAACCDE |
| Floor Structure | Enter the predominant type of floor structure being defined. If more than one type per section, enter the most predominant type. Code File FLRSYSCDE |
| Wall Structure | Enter the predominant type of wall structure being defined. If more than one type per section, enter the predominant type. Code file STRUCTCDE |
| Roof Structure | Enter the predominant type of roof structure being defined. If more than one type per section, enter the predominant type. Code file ROOFSTRCDE |
| Electrical | Enter the predominant type of electrical fixtures being defined. If more than one type per section, enter the most predominant type. Code file TALITCDE |
| Roof Type | This is a duplication of the earlier description and is not needed. |
| OF | Not used |
| OQ | Not used |

## OTHER FEATURES BLOCK

There is room for up to eight other features per section. The OF# is for the Other Features code defined in the code file ENERGYCDE. The ST field requires the number of stories that the Other Features code occupies. The AR/CT field asks for the total area of the total count of the Other Features code. None of the other fields are used in this section.

## INCOME INFORMATION BLOCK

Due to nature of confidentiality, these fields will rarely be used. When they are used for collecting actual income and expense data, the fields follow traditional pro-forma item descriptions.

## OPERATING STATEMENT (I&E)

The operating statement (I&E) is designed to collect and analyze income and expense information on income producing properties. With this information, the appraiser is able to estimate value through capitalization of income. The operating statement is divided into four major categories: market data, cost data, remodeling data, and income and expense data. The income and expense area of the statement is divided into four specialized areas: apartments, hotel/motel, general commercial (retail, warehousing, industry), and office buildings. The purpose of the specific income and expense areas is to allow the property owner/manager space to enter applicable income, expense, and amenity data.

## MARKET DATA

Space is provided to enter any sales information for both vacant and improved parcels. In addition, space is provided to enter the value of any personal property, inventories, or licenses that may have been included in the purchase price. Also, space is provided to enter the percent of mortgage, mortgage term, and interest rate.

## COST DATA

Space is provided to enter any construction cost information that is available concerning the subject property. When possible, sizes of additions, paving, etc., should be entered under the comments area.

## REMODELING DATA

Space is provided to enter the cost and a description of significant remodeling that has been associated with the building, the year of the remodeling, and whether the cost was attributable to the owner or a tenant.

## APARTMENTS - OPERATING STATEMENT

Space is provided to enter a detailed current quoted rent per month by unit type. In instances where rents are computed on a square foot basis, space is provided to note the total apartment complex rentable area.

Project amenities and unit built-ins should be noted as to what is included/ available in the apartment complex. The owner expense statement includes areas to enter what is paid by the owner and the costs associated for a two-year period. The occupancy percentage should be entered in the space provided. Space is also provided to enter the number of parking spaces available and the monthly rental charge, if applicable.

## HOTEL AND MOTEL - OPERATING STATEMENT

This area of the operating statement is designed to enter the income, expense, and amenities associated with the hotel and motel operations. Space is provided to list the number and type of room availability together with services and amenities per room. Income should be listed by rental type and amount per unit. Restaurant and lounge incomes should also be listed. Actual expense amounts should be obtained if possible and entered in the appropriate spaces.

## GENERAL RETAIL, WAREHOUSING, INDUSTRIAL, OTHER -OPERATING STATEMENT

This area is designed to enter income and expense amounts on general retail (retail sales), small industrial, and warehouse type facilities. Space is provided to enter the tenants, floor level, lease term, and floor area of the lease. Expenses are broken down into the general areas of insurance, taxes, maintenance, and utilities. Actual expense should be entered when available.

## OFFICE BUILDING -OPERATING STATEMENT

This area of the operating statement is to enter the applicable income and expense information for office buildings. Space is provided to enter the buildings total gross area, net rentable area, and lease terms, i.e., on a total gross or net rentable area. The amount of retail area should be entered together with the current occupancy rate. The income statement is designed to quote rent per square foot, based on floor level and whether escalation of rental clause is included. The expense area is broken down into three major categories: insurance and taxes, building maintenance, and utilities. Actual expense should be entered by category if available.